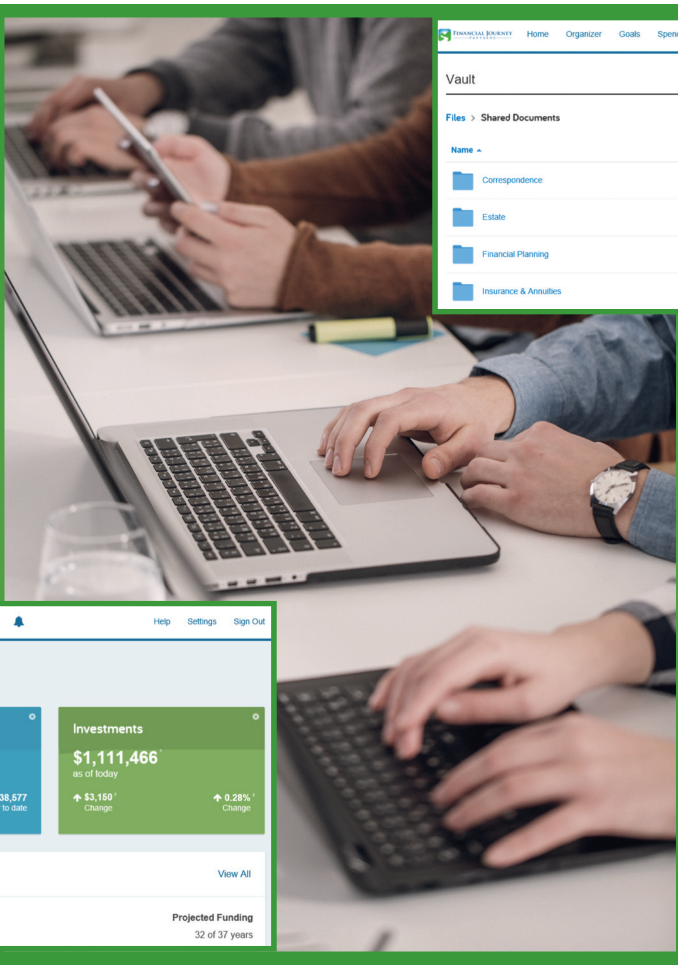
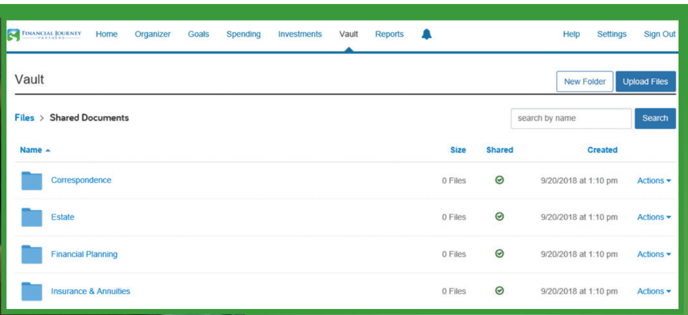
FINANCIAL JOURNEY PARTNERS

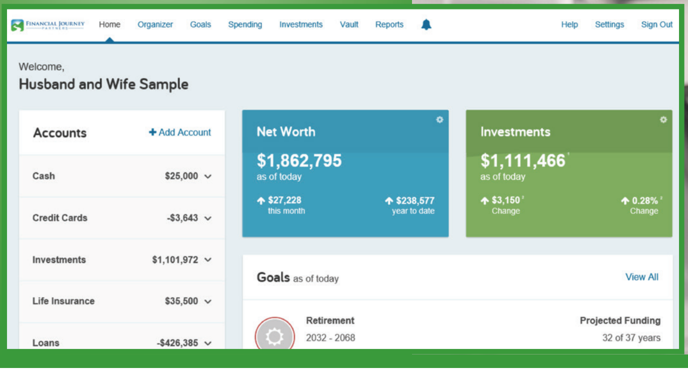
CLIENT PORTAL ENHANCEMENTS

Topics covered will include:

- How to navigate the site
- Connecting financial accounts to the site for automatic updates
- Reviewing & categorizing your spending
- Setting up alerts
- Tracking your goals







New Features with the Vault:

- Brokerage Statements
- Performance Statements
- Sharing Financial Documents

Bring Your Laptop or Tablet!

Light Refreshments Served

WHEN:

Thursday, Oct 18, 1 pm
Thursday, Nov 15, 6 pm

WHERE:

101 Metro Drive, Suite 264
San Jose, CA 95110

RSVP to Arielle at

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